



**CSC**

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STRONG**

# MadCap Flare Online Help Creation and Publishing Process Approach

January 12, 2011



# Agenda

- Review of the help system
  - Lots of new staff some new things to share- Tom Hoth
  - Demo of Help System in MPAS – Dan Austin
- Help creation process
  - Process Overview – Jennifer Snell
  - Online Help Scope and Screen Example – Jennifer Snell
  - Authoring Help – Jennifer Snell
  - Version Control – Dan Austin
- Review – Jennifer Snell
- Questions and Answers – Jennifer Snell



## Introduction

- **Online Help Team Members**
- Tom Hoth, UI Architect and Team Manager/Lead for Web Development
- Jennifer Snell, Senior Business Analyst, Web Development
- Dan Austin, Help System Developer



## Help Requirements from RFP

- 40.1.1.57 - Provides capability for selectable online help views for user functionality that duplicate or link to system documentation.
- 40.1.1.58 - Provides capability for online help for all features, functions, and data element fields as well as descriptions and resolutions for error messages, using help features, including indexing, searching, tool tips, mouse-over, field value options, hypertext links to files, reports, and context-sensitive help topics.
- 40.1.1.59 - Provides capability for context-sensitive help to view, window, or dialog.





## Online Help Scope

- Online Help will be created for the following:
  - General Public Portal
  - Operations Portal
  - Provider Portal
  - Recipient Portal
- Four Levels of Help:
  - System Help, by Portal (Includes Navigation Help, Button Help etc.)
  - Page Help
  - Data Form Group Help (Including Field Specific Help)
  - Tool Tip (Note: not managed in the Flare System)



# Online Help Screen Example



search...  | [Help](#)


## NCTracks

The Transparent Reporting, Accounting, Collaboration and Knowledge Management System

### Provider Portal

[Provider Portal](#) > Provider Enrollment


#### Provider Enrollment


Activate the links below to navigate. **NOTE:** Data is not saved unless the Next button is activated. 


- ☒ [Individual Information](#)
- ☐ [Reference ID](#)
- ☐ [Provider Type](#)
- ☐ [Accreditation](#)
- ☐ [Physical Address](#)
- ☐ [Hours of Operation](#)
- ☐ [After-Hours Coverage](#)
- ☐ [Correspondence Address](#)
- ☐ [Services](#)
- ☐ [Taxonomy Code](#)

#### Individual Basic Information




\* indicates a required field


 | [A-](#) [A+](#) | [Help](#)

Legend 

PROVIDER'S IDENTIFYING INFORMATION 

Enter your name as it is shown on your income tax return.

* Last Name:	<input type="text"/>	* First Name:	<input type="text"/>
Middle Name:	<input type="text"/>	Suffix:	-- Select One -- 
* Date of Birth:	<input type="text" value="mm/dd/yyyy"/> 	* SSN:	<input type="text"/>
* Gender:	-- Select One -- 	* NPI:	<input type="text"/>
Email:	<input type="text"/>	Zip Code:	xxxxxx-xxxx

EMPLOYER IDENTIFICATION NUMBER (EIN) 

Will your income be reported to an EIN?

☐ Yes ☐ No





## Navigation Pane

# Screen Example

## Content Pane

Table of Contents

- Welcome
- Operations
  - Page Template
  - Operations Landing Page, Secured
  - Log Out Page
  - Claims
  - HealthCheck
  - Financial Transactions
  - Prior Approval
  - Provider
  - Recipient
  - Reference
  - Third Party Liability
- Copyright

Table of Contents

Index

Search

Quick search

You are here: Welcome

## Welcome

# NCMMIS Operations Portal

## NORTH CAROLINA MEDICAID MANAGEMENT INFORMATION SYSTEM

### Quick Links

- [Claims](#)
- [HealthCheck](#)
- [Financial Transactions](#)
- [Prior Approval](#)
- [Provider](#)
- [Recipient](#)
- [Reference](#)
- [Third Party Liability](#)

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# Navigate by Table of Contents

Table of Contents

Quick search

Welcome

Operations

Page Template

Operations Landing Page, Secured

Log Out Page

Claims

HealthCheck

Search Health Check Recipient

Recipient Summary Display

Recipient Notifications

Recipient Comments

Recipient Head of Household De

Search-Add Staff

View-Update Health Check Coord

View-Update Supervisor-Director

View-Update State Staff

MAAR Search

View-Update MAAR

Search-Add Network

View-Update Network

View-Update Periodicity Schedule

View-Update Periodicity Schedule

Financial Transactions

Prior Approval

Provider

Table of Contents

Index

Search

You are here: [Operations](#) > [HealthCheck](#) > [Search Health Check Recipient](#)

Search Health Check Recipient

Recipient Search Page

- Allows you to search for a Recipient.
- Search will display a list of Recipient records that meets the search criteria.
- From the list of Recipient records you will select a specific Recipient record.
- You will be directed to a new page that displays the selected Recipient information.

Recipient Search Page

- Recipient Search
- Recipient Results

County

Select from the drop down box which county you are searching. For a specific Recipient it would be the county where the Recipient resides or, for a general search, it would be all Recipients for that county.

ZIP Code

Enter the postal code for the address or geographic area that you are searching.

Recipient Status

Select from the drop down box active, closed or deceased.

Recipient Last Name

Enter the Recipient's last name.

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## Navigate by Table of Contents

- Table of Contents is the outline structure of the Help System
- Click on closed books to open them and reveal contents
- Click on topics to show the contents in the Content Pane on the right

# Navigate by Index

Index

Quick search

Actual Availabl

Actual Limit

Actual Use

Add

Add Address

Add Periodicity

Address 1

Address 2

Address Selection

Address Type

Admin Entity2

Age

Age From

AINS/Ad hoc Reports

Amount Received

Application Number

Attempted Phone Calls

Attn to/Contact Name

Auth From

Autofill

Balance Amount

Begin Date

Begin Date(2)

Benefit Plan

Billed Amount

Billed Month

Billing Date

Table of Contents

Index

Search

Add Address

This page allows the user to view and update Recipient addresses by Payer. Recipient address is maintained by multiple address types and each type is associated with begin date and end date. The page allows a user to add a new address by address type with a begin date and also allows a user to update the end date against the existing address. Update to end date is audited and the previous value of end date is stored in the audit table.

Payer

Select Payer identifier that defines all Payers (DMA, DMH, DPH) from the drop down list.

Address Type

Select the address type code from the drop down list that defines the different type of address (Mailing, Correspondence, Temporary, Work. etc.)

Begin Date

Click on the Calendar Icon and select the date when the Recipient started at this address.

End Date

Click on the Calendar Icon and select the date when the Recipient left this address.

Attn to/Contact Name

Enter the name of a person to whom any correspondence for the Recipient is to be sent.

Phone

Enter Primary Phone Number including area code for the Recipient.

Street

Enter the street address that corresponds to the selected Address Type.



## Navigate by Index

- Click on Index “Accordion Button” at bottom of Navigation Pane
- Find the term you want in the list and click it to jump to the topic where the indexed term is located
- If the term is found in more than one topic, a list of topics will be shown
- Click on the topic in the list to jump to it

# Navigate by Search

Search

Rank	Title
1	Search Health Check Recipient
2	Manage Recipient Search
3	Recipient Summary Display
4	Manage Recipient Search Result E
5	Manage Recipient Combine Initiati
6	Manage Real-Time Search in CND
7	View Possible Duplicate and Initiat
8	View-Update MAAR
9	Recipient Head of Household Deta
10	Manage Online Recipient Address
11	Manage Real-Time Demographic U
12	Manage Online Link/De-Link Famil
13	Manage Online COCC, ID Cards ar
14	Manage Real-Time Addition of CND
15	About Recipient - Operations
16	View Online Transfer of Assets Pag
17	Recipient Notifications
18	Manage Online State Authorized Ps
19	Recipient Comments

Table of Contents

Index

Search

Quick search

You are here: [Operations](#) > [HealthCheck](#) > **Recipient** Head of Household Detail

## Recipient Head of Household Detail

The system takes you to this page when you click on the head of the household field on the “Recipient Summary Display” page. This page displays the Heath Check Recipient’s parent/guardian information. It also lists all of the Health Check **Recipients** in that household.

**Head of Household Last Name**

This is the parent or head of household’s last name.

**Head of Household First Name**

This is the parent or head of household’s first name.

**Recipient ID**

This field indicates the Heath Check Recipient’s Medicaid ID number.

**Address 1**

This is the first line of the parent or head of household’s address.

**Address 2**

This is the second line of the parent or head of household’s address.

**City**

This is the city for the parent or head of household’s address.

**State**



## Navigate by Search

- Click on Search “Accordion Button” at bottom of Navigation Pane
- Type a word for phrase in the Search Box and click the Search Button
- A list of relevant topics is displayed
- Click on a topic in the list to jump to it

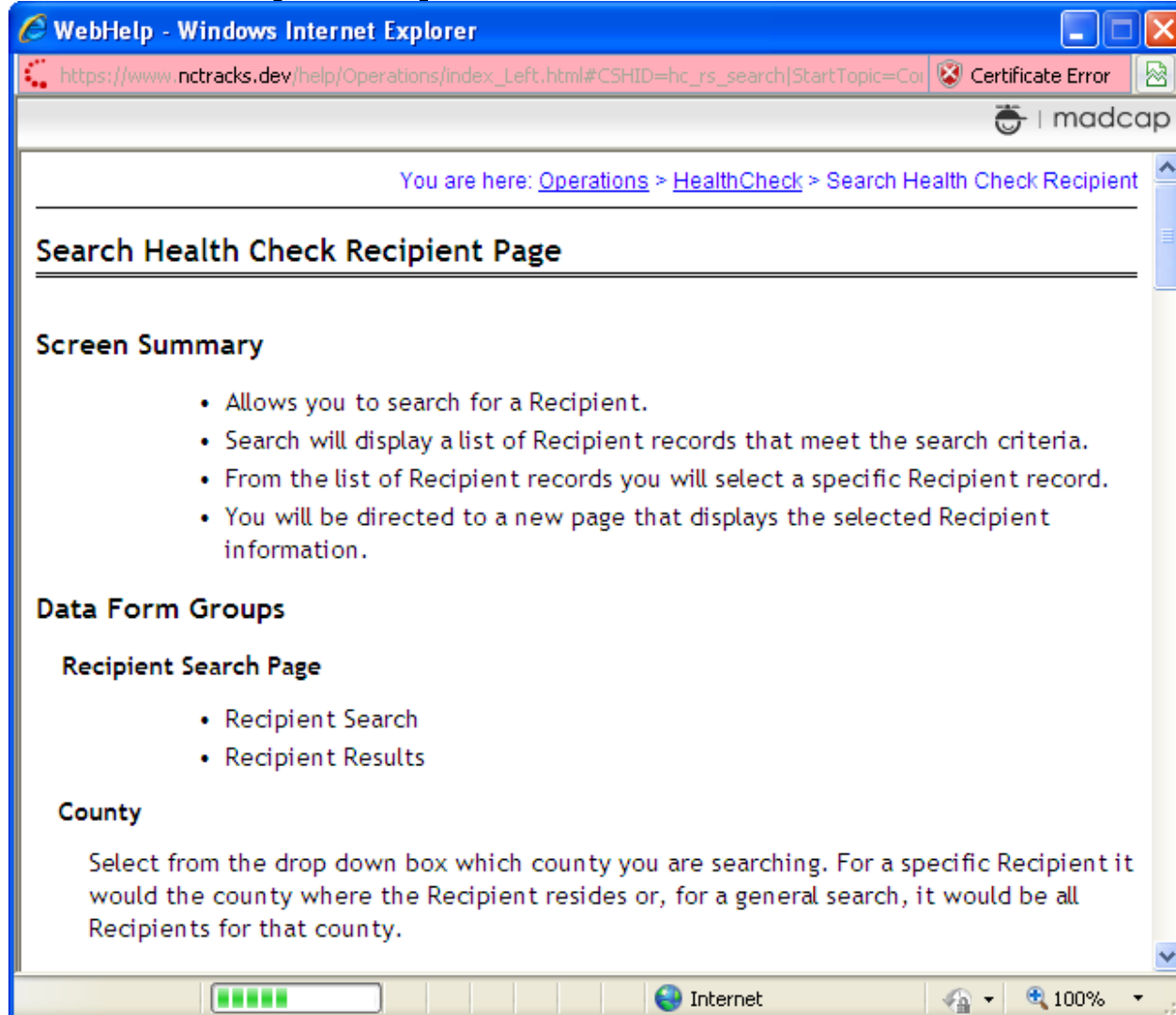




## Data Form Group Help

- Click on a Question Mark for help on that section
- The Help System jumps directly to the help for that section

# Data Form Group Help





## Data Element Definitions

- Each topic contains a list of Data Elements for that Screen
- Clicking on a Data Element Name opens a pop-up window containing the definitions for that Data Element

Data Elements

- [NC ID \(Search Box\)](#)
- [Network \(Search Box\)](#)
- [Staff Type \(Search box\)](#)
- [Last Name \(Search Box\)](#)
- [First Name \(Search Box\)](#)
- [Status](#)
- [Network](#)
- [Status](#)
- [Last Name](#)
- [First Name](#)
- [Pending](#)
- [Status](#)
- [Request](#)
- [Submit](#)
- [Submit](#)
- [Date](#)
- [Staff T](#)
- [NC ID](#)
- [Staff T](#)
- [Effect](#)

### Staff Last Name

NCMMIS Number: 3863

Description: Staff Last Name

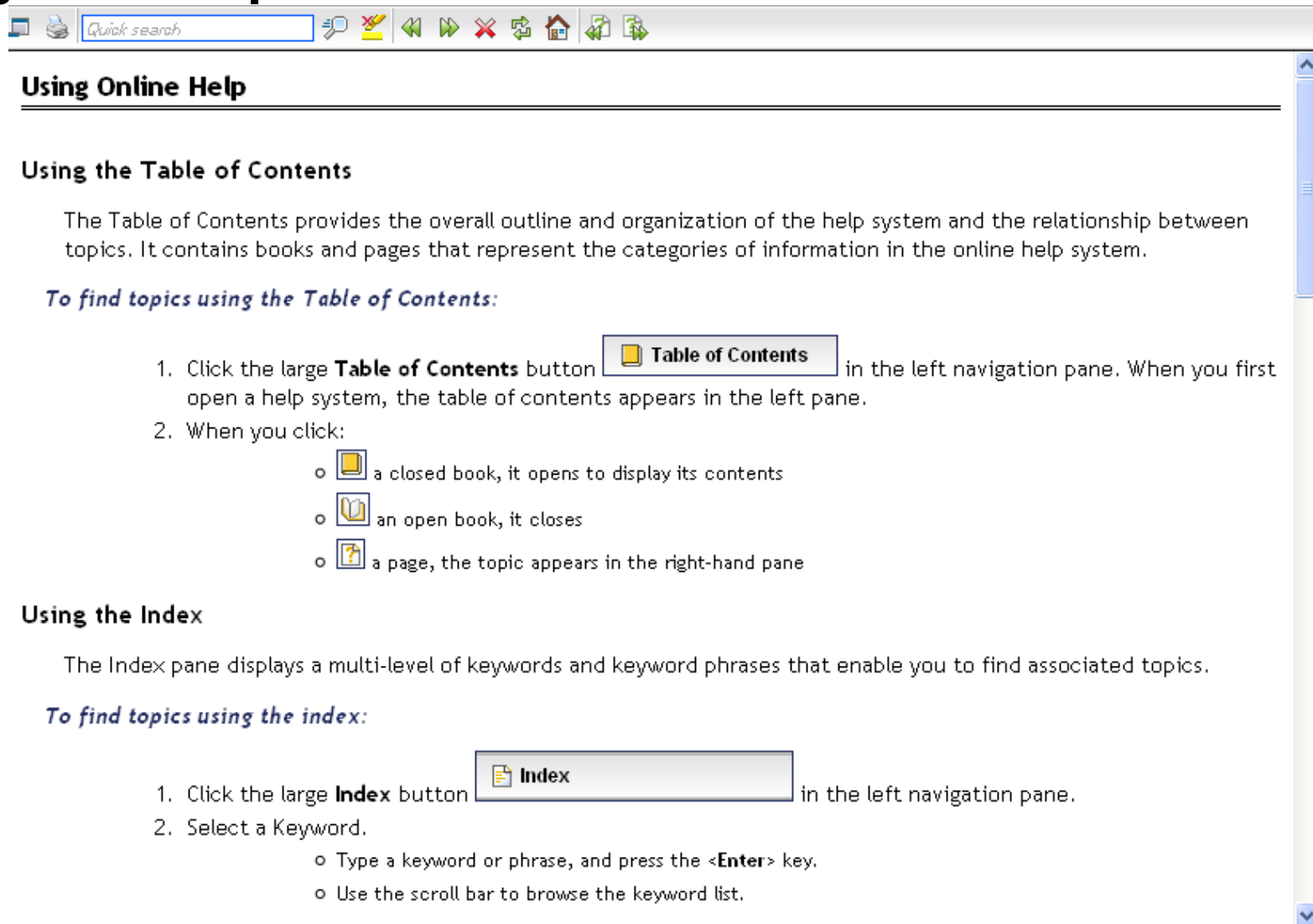
Data Type: CHARACTER

Size: 35

Functional Area Owner: Health Check

[See also](#)

# System Help







The screenshot shows a software interface for 'System Help'. At the top, there's a header bar with a 'Quick search' text box and several navigation icons. Below this, the main content area is titled 'Using Online Help'. Underneath, there's a section 'Using the Table of Contents' which explains the purpose of the Table of Contents and provides instructions on how to use it. The instructions are numbered 1 and 2, with sub-points for the second step. A callout box labeled 'Table of Contents' points to the first instruction. Below this, there's a section 'Using the Index' which explains the purpose of the Index pane and provides instructions on how to use it. The instructions are numbered 1 and 2, with sub-points for the second step. A callout box labeled 'Index' points to the first instruction. The interface also features a vertical scrollbar on the right side of the main content area.

**Using Online Help**

**Using the Table of Contents**

The Table of Contents provides the overall outline and organization of the help system and the relationship between topics. It contains books and pages that represent the categories of information in the online help system.


*To find topics using the Table of Contents:*

1. Click the large **Table of Contents** button  **Table of Contents** in the left navigation pane. When you first open a help system, the table of contents appears in the left pane.
2. When you click:
  -  a closed book, it opens to display its contents
  -  an open book, it closes
  -  a page, the topic appears in the right-hand pane

**Using the Index**

The Index pane displays a multi-level of keywords and keyword phrases that enable you to find associated topics.

*To find topics using the index:*

1. Click the large **Index** button  **Index** in the left navigation pane.
2. Select a Keyword.
  - Type a keyword or phrase, and press the <Enter> key.
  - Use the scroll bar to browse the keyword list.



## System Help

- “Help on Help”
- Shows the user how to navigate through the help system to easily find the information they need
- Describes the system functions and how they work:
  - ✓ Breadcrumbs
  - ✓ Data Grids
  - ✓ Buttons





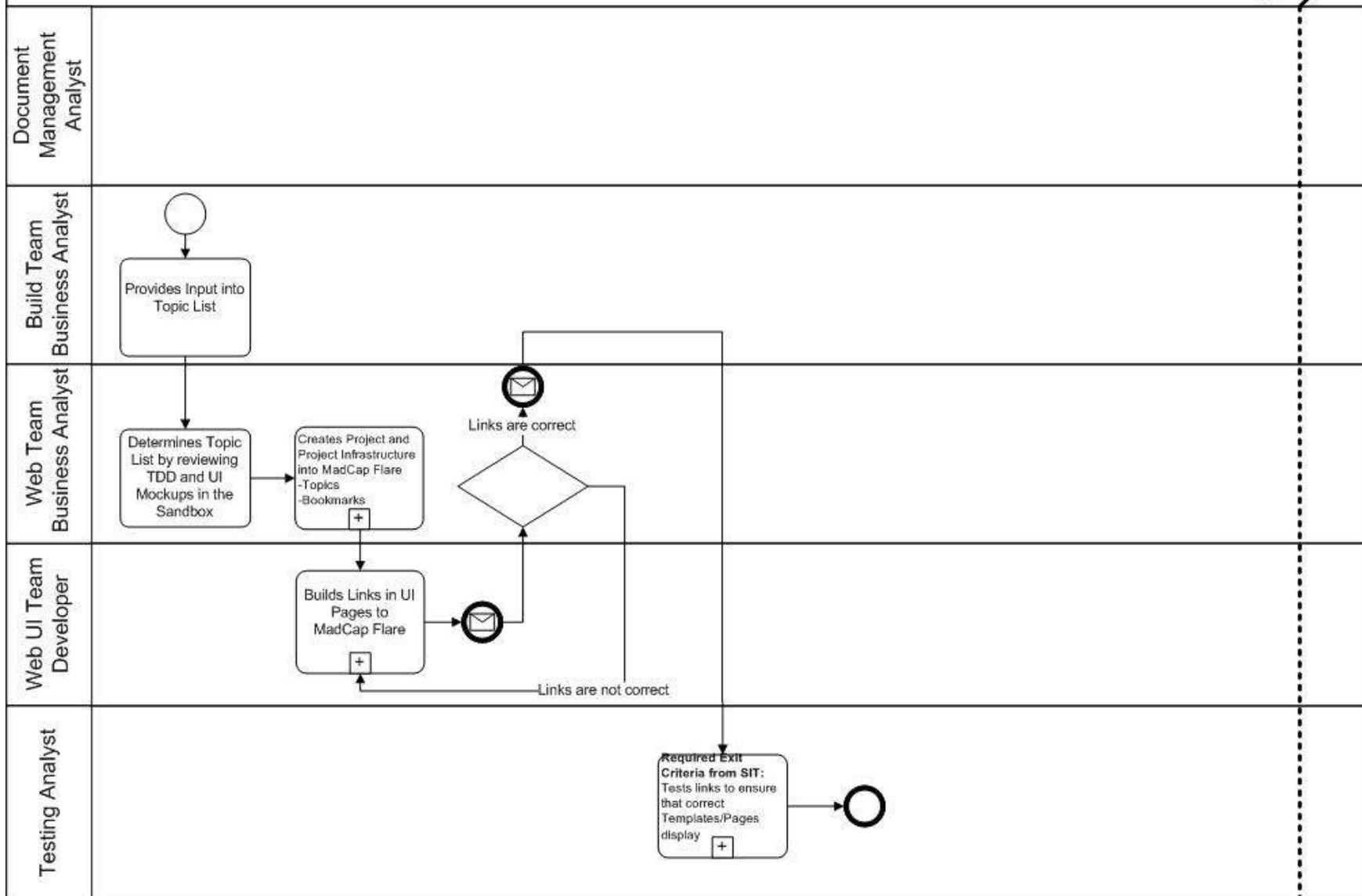
## Online Help Creation and Publishing Process Overview

- Systems Integration Test
- User Acceptance Test



## Creating Online Help for SIT

SIT >







## Master Help Documentation

- <http://sandbox.nctracks.com/help/Master/>
- Contains the contents of all portals' help systems
- For internal review purposes only



## Help Content Version Control

- All project files will be housed on a server
- Versioned and stored in Subversion





## Review

- Four Levels of Help  
(System, Page, Data Form Group, Tooltips)
- Help Demo
- Help Process
  - Web Team will create MSWord output templates for each topic
  - Build Business Analysts will author content
- Average Amount to create one page of help 15-30 minutes, depending on complexity
- Web Team will automatically populate Data Elements for a page



# Questions and Answers